

Introduction and User Guide for SharePoint Collaborative Workspaces

Contents

Chapter	Page
Chapter 1: Introduction and Overview	3
Chapter 2: Viewing Document Libraries and Lists in SharePoint	4
Chapter 3: Document Libraries	7
1. Creating New folders and documents	7
2. Uploading documents.	8
3. Editing document and folder properties	9
4. Deleting documents or folders	10
5. Creating new versions of documents and viewing version history	11
Chapter 4: Resources	14
Chapter 5: News Items	16
Chapter 6: Calendar	17
Chapter 7: Tasks	18
• Editing a task	19
Chapter 8: Discussion Boards	20
• Viewing and replying to a discussion	21

Chapter 1: Overview

What is a collaborative Site?

This document will give potential users an overview of all the functions which can be provided for your SharePoint Collaborative site. It will also explain how these items can be customised to suit your needs.

How do I use it?

This user guide has been prepared to give users with contribute permissions guidance on the tools provided as standard on a SharePoint collaborative workspace.

This document will cover briefly how to view (with read only access) content placed on a collaborative site and then go into more details on how a collaborative users can interact with the site and add and edit contents with the appropriate permissions.

How do I get it?

You should consider the features outlined in this document and define which you would find appropriate for your collaborative space.

Sites can be created for collaborative within or across university departments for **university use only**. Personal sites will not be created!

Initially site will be created for University staff but if there is a requirement to introduce external users to access the site this will be considered as part of the application for the site.

Appendix one includes some questions regarding your requirement for a collaborative site. If you can fill in these details and pass to the XXXX team for assessment the creation of your site can begin.

Chapter 2: Collaborative Site Functions

This section will outline the standard features of a collaborative site, how they can be modified. Further chapters will explain the features in more details.

Document Libraries

One or more document Libraries can be created and titled as required. Document Libraries allow users to create folder structures, upload and create new documents and provide version control



A typical SharePoint menu will include the following:

Document Libraries specific to the collaborative site. These will be available to store and view documents and media of any kind. Each document Library can be made up of documents and sub folders.

Other web **Resources** relating to the collaborative space can be added and made available.

News items can be added and viewed from the **News** list or the site home page.

Calendar appointments relating to the site can be viewed in the calendar list

Completed and Outstanding **Tasks** can be viewed in the task list

Discussion Boards can be viewed under the discussions Sections.

Chapter 2: Viewing Document Libraries and Lists on SharePoint

To view any content on a SharePoint Collaborative site the left hand menu (See below) can be used to navigate through all the high level content on the site.

1. To View the site:



A typical SharePoint menu will include the following:

Document Libraries specific to the collaborative site. These will be available to store and view documents and media of any kind. Each document Library can be made up of documents and sub folders.

Other web **Resources** relating to the collaborative space can be added and made available.

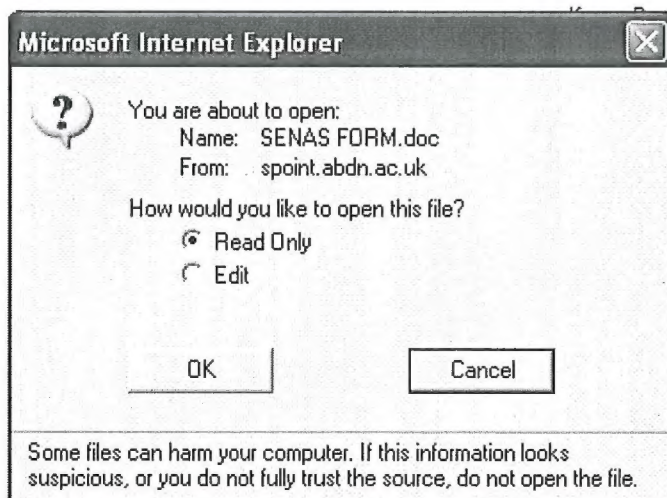
News items can be added and viewed from the **News** list or the site home page.

Calendar appointments relating to the site can be viewed in the calendar list

Completed and Outstanding **Tasks** can be viewed in the task list

Discussion Boards can be viewed under the discussions Sections.

Once you have selected what you wish to view you can do so simply by clicking on the title of the required task, discussion, News item etc and it will open. The same is also true when selecting a document to view, although collaborative users will also be asked if they want to only Read the document or check it out and edit it. This relates to using version control on the site which will be covered in the next Chapter: Document Libraries.



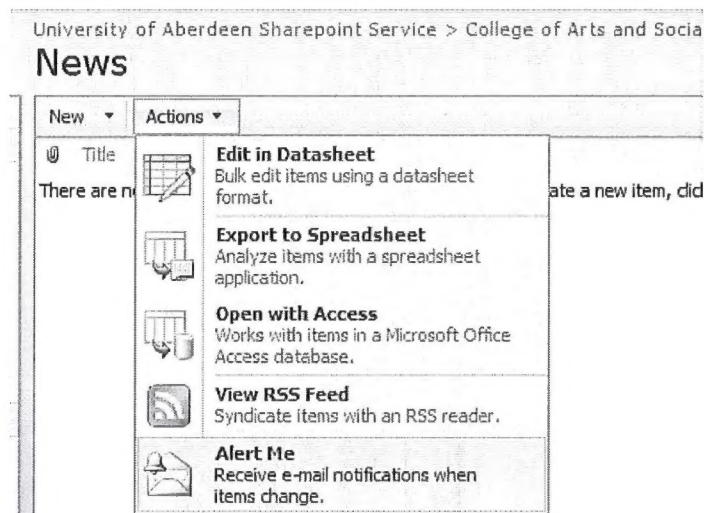
2. Getting email Alerts to changes on the site.

Users can set themselves up to receive email alerts to any changes on the site. This can be done at the document library level or on an individual document level.

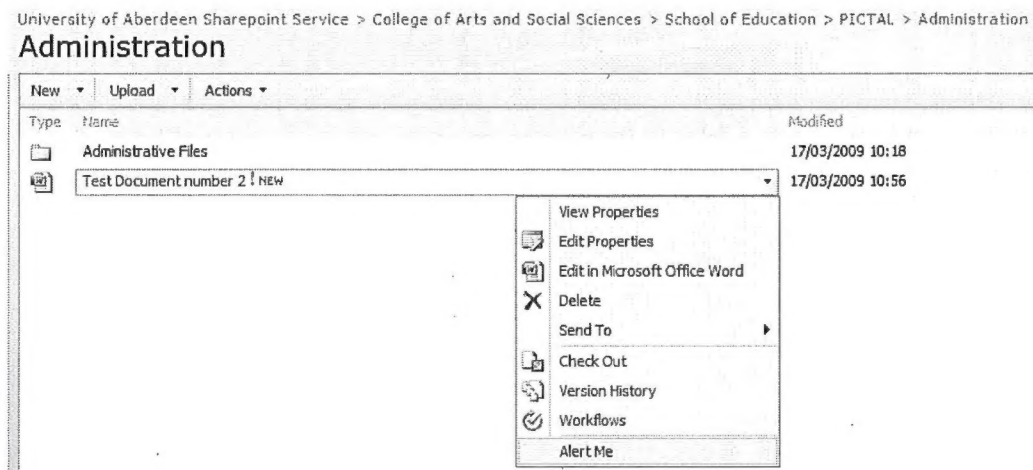
To set up an alert:

- Navigate to the document library, document, or other item you wish to be alerted about.

For whole Document Libraries or any other List item you should select 'Alert Me' from the actions toolbar at the top of the screen



For individual Items you should select 'Alert Me' from the drop down menu against that item.



Once you select to receive alerts you will be asked to confirm how you want these alerts to be received.

The options you have to consider are:

- The **title** of the alert – this can be decided by the user but a suggestion is always made.

- The **Type** of change you want alerted to (Only available when being alerted to multiple items in a list/library), options are: All Changes; New Items Added; Existing Items Modified; Items Deleted; Web Discussion Updates.
- Alerts for changes made when: Anything Changes; Someone else changes a document; Someone else changes a document Created by Me; Someone else changes a document last modified by me.
- **When to Send Alerts:** Immediately; Daily Summary; Weekly Summary.

Making your choices and clicking OK will set up the alert.

University of Aberdeen Sharepoint Service > College of Arts and Social Sciences > School of Education > PICTAL > Administration > New Alert

New Alert

Use this page to create an e-mail alert notifying you when there are changes to the specified item, document, list, or library.
View my existing alerts on this site.

Alert Title
Enter the title for this alert. This is included in the subject of the e-mail notification sent for this alert.

Administration

Send Alerts To
This alert will be sent to the e-mail address indicated.

E-mail address:
com251@abdn.ac.uk

Change Type
Specify the type of changes that you want to be alerted to.

Only send me alerts when:

☒ All changes
☐ New items are added
☐ Existing items are modified
☐ Items are deleted
☐ Web discussion updates

Send Alerts for These Changes
Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

Send me an alert when:

☒ Anything changes
☐ Someone else changes a document
☐ Someone else changes a document created by me
☐ Someone else changes a document last modified by me

When to Send Alerts
Specify how frequently you want to be alerted.

☒ Send e-mail immediately
☐ Send a daily summary
☐ Send a weekly summary

Time:
Tuesday 11:00

Chapter 3: Document Libraries

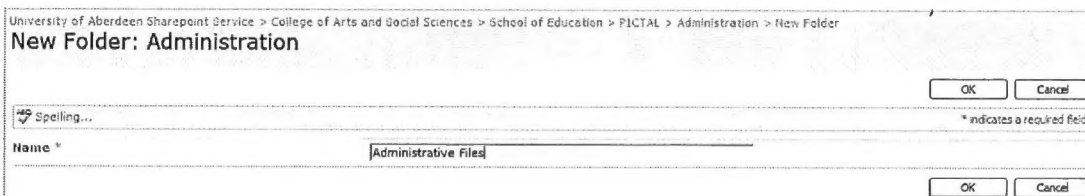
1. Creating New folders and documents

By navigating to the required document library users can add folders and documents to a library by using the 'New' and 'Upload' options available to them in the document Library.

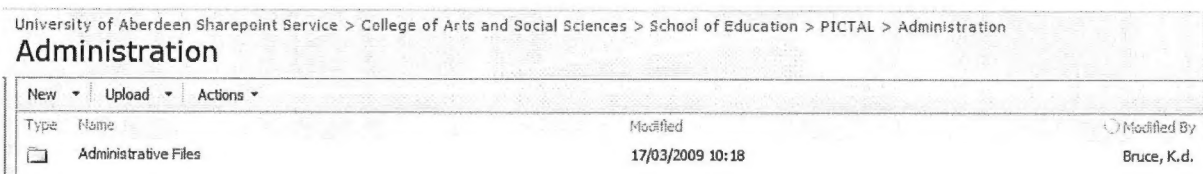
- To create a new folder or document select the 'New' drop down menu and choose either Folder or document to add.



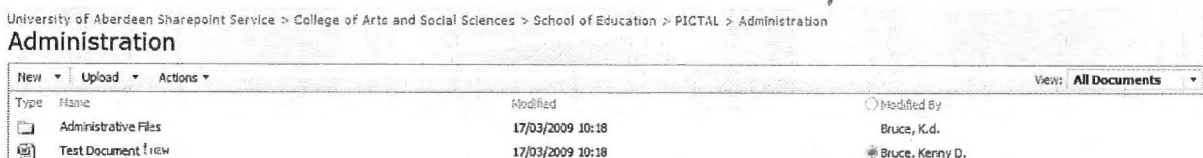
- If you choose 'New Folder', you will be prompted to enter the folder a name before clicking OK.



- The folder will then be added to the document library to be populated with documents and/or additional subfolders.



- If you choose 'New Document' you will be presented with a blank Word Document (this is the standard template although others such as excel or braded documents can be created if required). You will then be able to write in the document before saving it directly into the SharePoint folder.

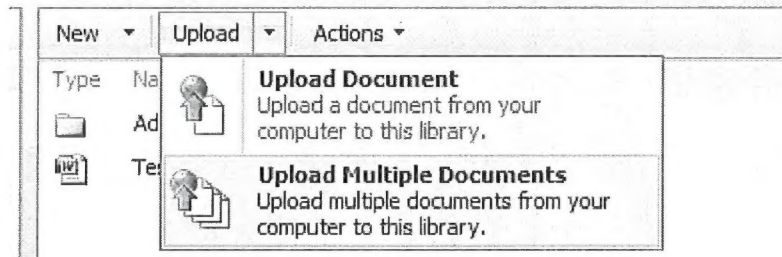


2. Uploading documents.

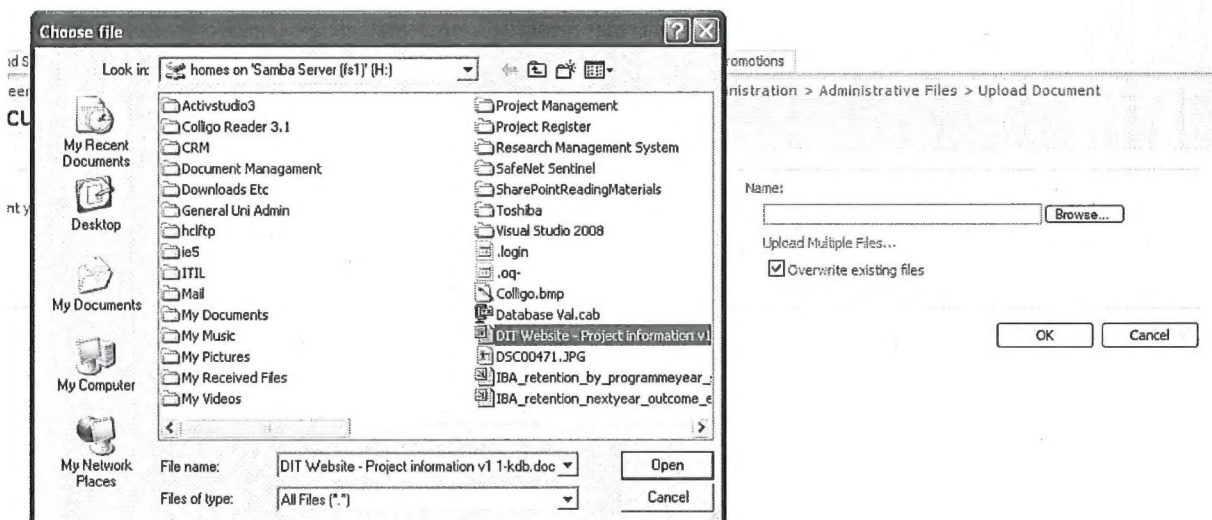
Users can upload single or multiple documents from an existing drive. To do this, navigate to the document library and folder within which you wish to upload the document:

- Select the 'Upload' drop down menu and choose upload a single or multiple documents.

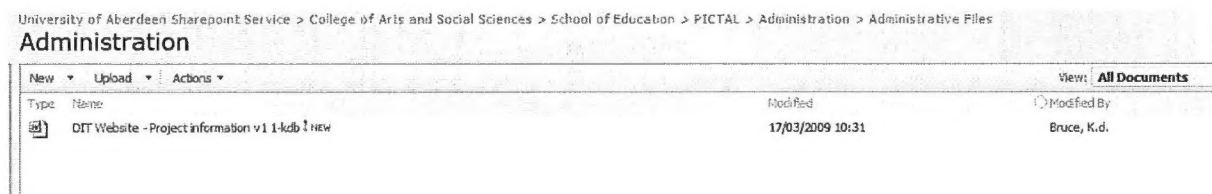
University of Aberdeen Sharepoint Service > College of Arts and
Administration



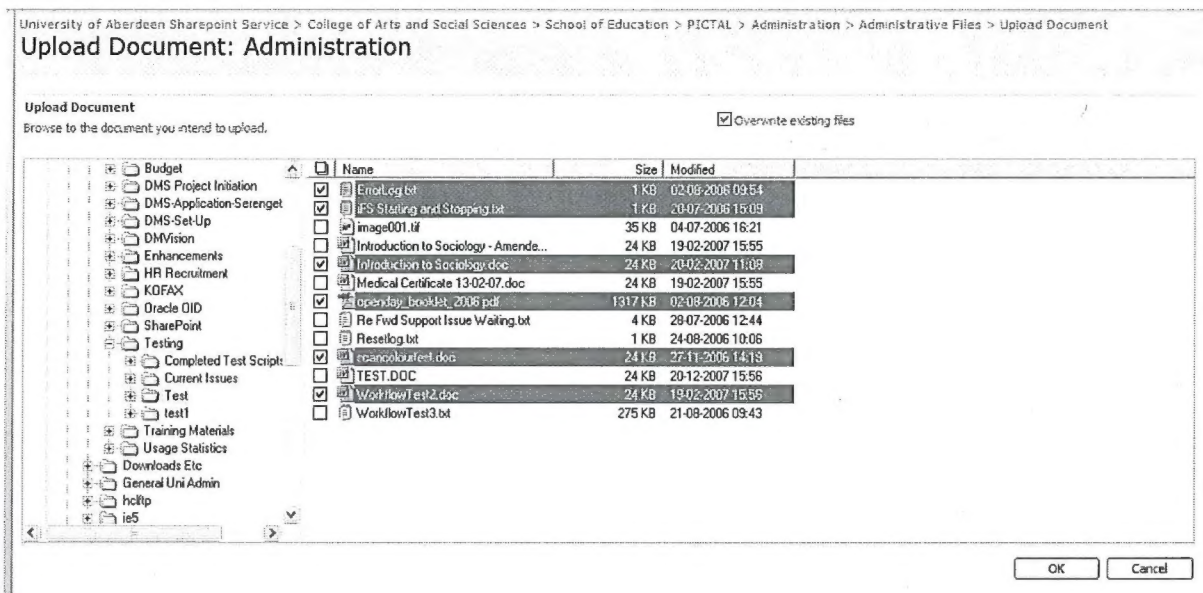
- Choosing 'Upload document' will allow you to browse your document drives to select the file you wish to upload. Similar to adding an attachment to an email.



- Double clicking on the file and selecting OK will upload the document to the required folder.



- Choosing 'Upload Multiple Documents' will allow you to select a number of documents from a folder in an existing drive



- Highlighting all required documents and clicking OK will upload the documents to the required folder.

University of Aberdeen Sharepoint Service > College of Arts and Social Sciences > School of Education > PICTAL > Administration > Administrative Files

Administration

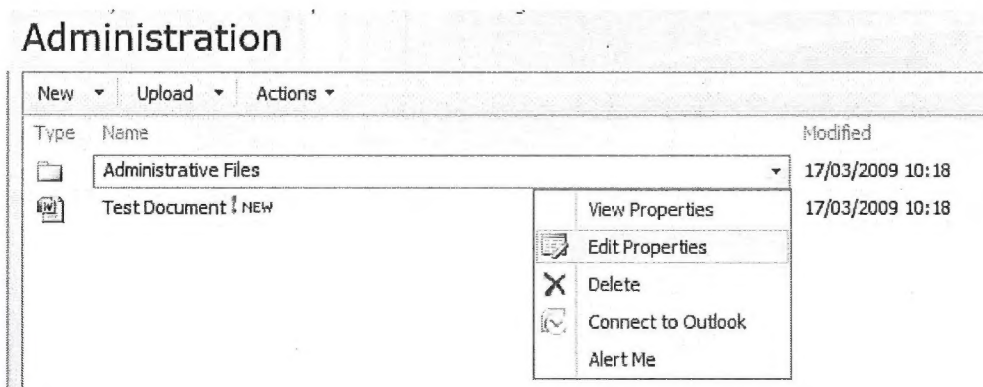
Type	Name	Modified	Modified By
Document	DIT Website - Project Information v1 1-kxb NEW	17/03/2009 10:31	Bruce, K.d.
Document	ErrorLog NEW	17/03/2009 10:34	Bruce, K.d.
Document	IFS Starting and Stopping NEW	17/03/2009 10:34	Bruce, K.d.
Document	Introduction to Sociology NEW	17/03/2009 10:34	Bruce, K.d.
Document	openday_booklet_2006 NEW	17/03/2009 10:34	Bruce, K.d.
Document	scancolourtest NEW	17/03/2009 10:34	Bruce, K.d.
Document	WorkflowTest2 NEW	17/03/2009 10:34	Bruce, K.d.

3. Editing document and folder properties

Once you have created documents and folders in a document library you have the ability to edit the properties of a document or a folder.

To do this:

- Select the required document or folder and choose 'Edit Properties' from the drop down menu available on the item



- You can then choose to change the name of the document or folder as needed.

University of Aberdeen Sharepoint Service > College of Arts and Social Sciences > School of Education > PICTA

Administration: Test Document

* indicates a required field

Name * .docx

Document Name

Name of Applicant for Promotion or Contribution Award

Created at 17/03/2009 10:18 by Bruce, Kenny D.

Last modified at 17/03/2009 10:18 by Bruce, Kenny D.

- Changing the name and selecting 'OK' will make the required changes to the item.

University of Aberdeen Sharepoint Service > College of Arts and Social Sciences > School of Education > PICTAL > Administration

New ▾ Upload ▾ Actions ▾		
Type	Name	Modified
	Administrative Files	17/03/2009 10:18
	Test Document number 2 <small>NEW</small>	17/03/2009 10:56

4. Deleting documents or folders

Documents can be deleted by selecting the 'Delete' option on any folder or document and selecting OK. You will be given a warning and asked to confirm the action.

Administration

New ▾ Upload ▾ Actions ▾

Type	Name	Modified
	Administrative Files	17/03/2009 10:18
	Test Document number 2 <small>NEW</small>	17/03/2009 10:56

View Properties
Edit Properties
Delete
Connect to Outlook
Alert Me

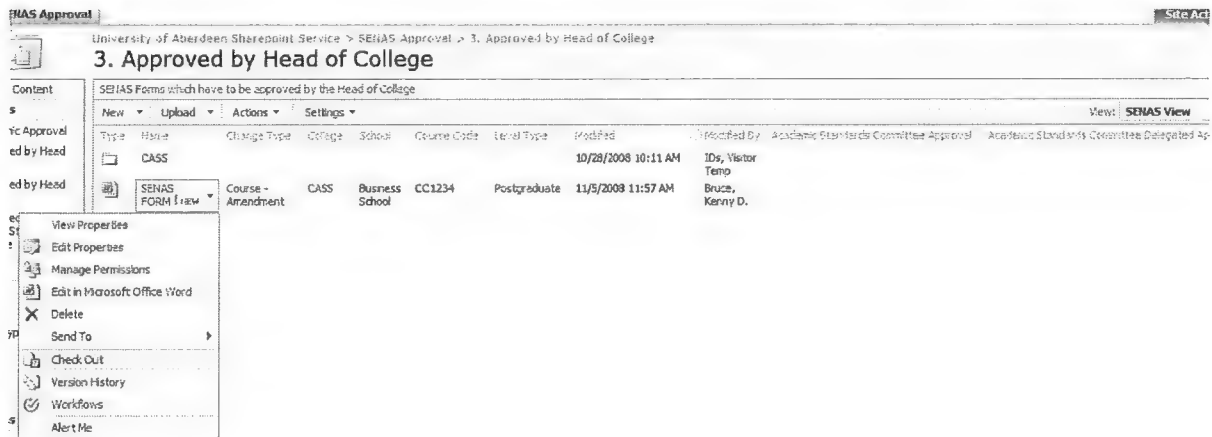
Windows Internet Explorer

Are you sure you want to send this folder and all its contents to the site Recycle Bin?

5. Creating new versions of documents and viewing version history

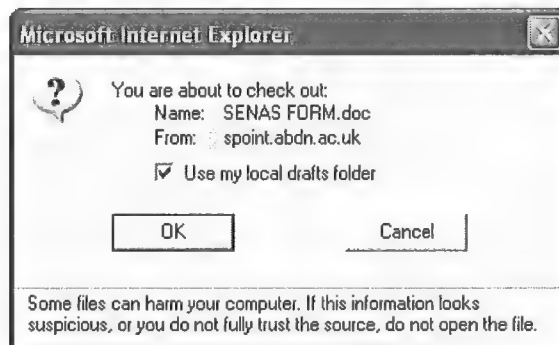
Users with the appropriate permissions can edit the content of documents. Moreover, by checking out the documents and making comments on the changes made a version history of changes can be kept. To edit a document:

- Navigate to file you wish to amend and select 'Check Out' from the drop down menu against the document.

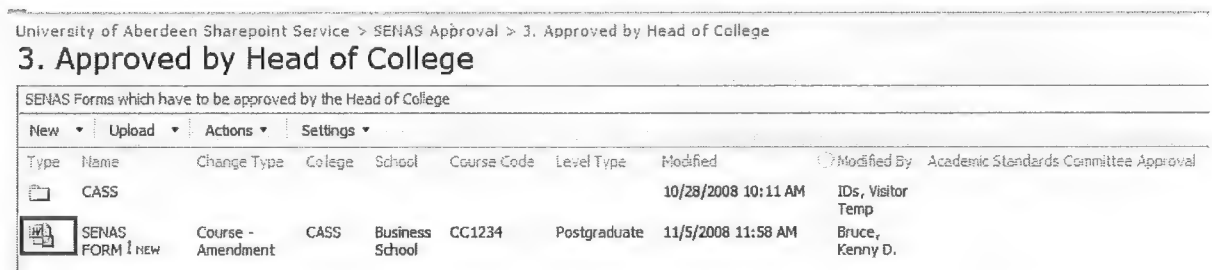


'Check Out' document

- Then select the OK when asked to confirm. See Below.



- Checked out documents are marked as seen below and will allow other users to view the current document, but will not allow anyone else to make changes.



'Checked Out' document

- To open the document for editing click the title of document it will be opened.
- Make any changes to the document as required and then select 'Check In' to confirm you are finished making changes. See below.

University of Aberdeen

PROPOSAL FOR CHANGES TO COURSES OR PROGRAMMES

GUIDANCE NOTES are available on-line by following the link at the relevant Question or at:
http://www.abdn.ac.uk/registry/senas/cread_guidance.shtml

This form may be used to propose changes to more than one course or programme: in such cases, the rationale for the changes and the implications of the changes for other courses/programmes must be made clear for each course/programme to be changed.

Some changes to courses will necessitate a change in Course Code (see the Guidance Notes).

1. Course/Programme Title(s):
2. Course/Programme Code(s):
3. Course/Programme Co-ordinator(s):
4. Sponsoring School(s):
5. Academic Year from which the proposed change(s) will be effective [see Guidance Note]:
6. Give details of the proposed change(s) below and indicate the rationale for the change(s) [see Guidance Note]:

Shared Workspace

SENAS Approval
Open site in browser

Status

Document checked out to:
Bruce, Kenny D.

Amending and 'Checking In' a document

- You will be prompted to add any comments on the changes you have been made. These can be entered in the Version Comments box.
- Select OK to confirm changes and check the document back in.

Check In

Version Comments

Some amendments made to X, Y and Z

☐ Keep the document checked out after checking in this version.

Version Comments and Confirm

- The revised document is now available for others to view and the changes and any comments will be logged in the documents version history.

To View the Version History select 'Version History' drop-down menu next to the document.

Administration

New ▾ Upload ▾ Actions ▾

Type	Name	Modified
Administrative Files		17/03/2009 10:18
Test Document number 2 ! NEW		17/03/2009 10:56

View Properties
Edit Properties
Edit in Microsoft Office Word
Delete
Send To ▸
Check Out
Version History
Workflows
Alert Me

This will allow the viewer to see all versions of the document (By selecting the date). It will also show any comments made when documents have been checked in and show any changes to the documents properties.

University of Aberdeen Sharepoint Service > SENAS Approval > 3. Approved by Head of College > SENAS FORM > Version History

Versions saved for SENAS FORM.doc

All versions of this document are listed below with the new value of any changed properties.

Delete All Versions

No.	Modified	Modified By	Size	Comments
4.0	11/5/2008 12:14 PM	Bruce, Kenny D.	48 KB	Some amendments made to X, Y and Z
3.0	11/5/2008 12:03 PM	Bruce, Kenny D.	47 KB	
2.0	11/5/2008 11:57 AM	Bruce, Kenny D.	47 KB	
	Title	Change to Title		
	Course Code	CC1234		
1.0	11/5/2008 11:53 AM	Bruce, Kenny D.	47 KB	
	Title	SENAS3		
	Change Type	Course - Amendment		
	College	CASS		
	School	Business School		
	Level Type	Postgraduate		
	Content Type	SENAS		

Version History View

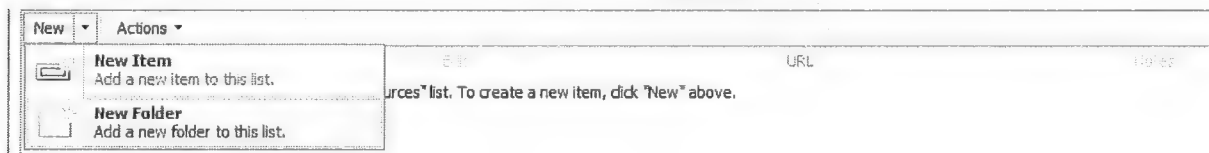
Chapter 4: Resources

Resource Lists contain links to web addresses which contain information that is considered of interest to the SharePoint Site audience. This could relate to external resources or other areas of the SharePoint system.

Resource Lists can be created within a folder structure in the same way as document libraries and folders can be created by selecting the 'New' then 'New Folder' from the drop-down menu using the same process.

University of Aberdeen Sharepoint Service > College of Arts and Social Sciences > School of Education > PICTAL > Resources

Resources



The screenshot shows the 'New' dropdown menu in a SharePoint list. The menu is open, showing two options: 'New Item' and 'New Folder'. Below 'New Item' is the text 'Add a new item to this list.' Below 'New Folder' is the text 'Add a new folder to this list.' The background shows a table with columns 'Title', 'URL', and 'Notes'. The first row has the text 'Resources' in the 'Title' column.

To add a new resource Item you can:

- Select 'New Item' from the 'New' drop down menu.
- Enter the details required

URL: This is the web address required to access the site. You can use the (Click here to test) function to ensure the details have been entered correctly.

Description: This is how the link will be displayed, rather than a potentially meaningless URL













Notes: Any details that might be of interest to the audience can be added here.



The screenshot shows the 'Resources: New Item' form. At the top, there is a breadcrumb trail: 'development > Demo > Resources > New Item'. Below this is the title 'Resources: New Item'. There are two 'OK' and 'Cancel' buttons. Below the buttons is a 'Spelling...' link and a note '* indicates a required field'. The form has three main sections: 'URL *', 'Description', and 'Notes'. The 'URL *' section has a text box with the value 'http://www.abdn.ac.uk' and a '(Click here to test)' link. The 'Description' section has a text box with the value 'University of Aberdeen HomePage'. The 'Notes' section has a text box with the value 'This is the univerisity home page which might be of interest to some.' At the bottom, there are two 'OK' and 'Cancel' buttons.

- Clicking OK will add the link to the site.

Resources

New ▾		Actions ▾	Settings ▾
Type	URL		
	 Proposal Doc		
	 Welcome to Google		Notes
	 Aberdeen Uni Site		Note
	 Uni Website		View this
	 Link to Policy		Please review of interest.
	 University of Aberdeen HomePage ▾		This is the university home page which might be of interest to some.

Chapter 5: News Items

News Items can be used to highlight items of interest to the SharePoint Site Audience. This could relate to events or updates and can also contain attachments.

News Items can be created by selecting the 'New' then 'New Item' from the drop-down menu in the News List.

development > Demo > News

News



The screenshot shows the top of a SharePoint list titled 'News'. There are three tabs: 'New', 'Actions', and 'Settings'. The 'New' tab is active, and a dropdown menu is open showing 'New Item' with the description 'Add a new item to this list.' Below the menu is a small icon of a document.

To add a new resource Item you can:

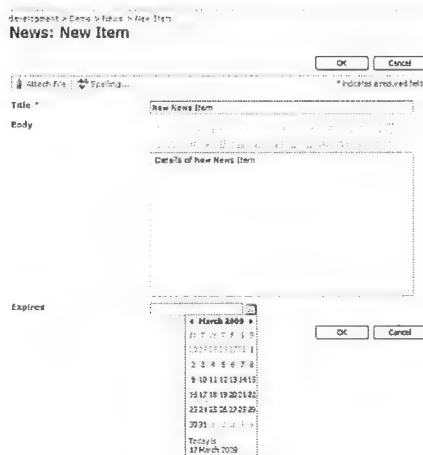
- Select 'New Item' from the 'New' drop down menu.
- Enter the details required

Title: This is the title of the News Item

Body: The details of the News item you wish to publish.

Expires: You can select an expiry date from the calendar which will remove the News Item when it is considered to be out of date.

Attach File: You can attach a file you already have available to be part of the new item in the same way you would attach a document to an email.



The screenshot shows the 'New News Item' form. At the top, there are 'OK' and 'Cancel' buttons. Below them is a section for 'Attach File' with a 'Browse...' button. The form has two main text areas: 'Title' and 'Body'. Below the 'Body' field is a section for 'Expires' with a calendar icon. The calendar is open, showing the month of March 2009. The date 17 is selected. There are also 'OK' and 'Cancel' buttons at the bottom of the calendar.

- Clicking OK will add the News Item to the site.



The screenshot shows the 'News' list in SharePoint. It has a table with columns for 'Title', 'Created', and 'Modified'. The table contains several items, including 'New News Item', 'New News Item', and 'New News Item'. The 'Created' and 'Modified' columns show dates and times.

Title	Created	Modified
New News Item	17/03/2009 12:40	17/03/2009 12:40
New News Item	17/03/2009 14:32	17/03/2009 14:32
New News Item	18/03/2009 13:55	18/03/2009 13:55
New News Item	17/03/2009 14:59	17/03/2009 14:59
New News Item	17/03/2009 15:06	17/03/2009 15:06

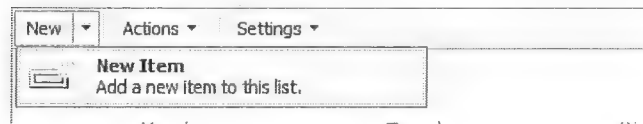
Chapter 6: Calendar

The Site Calendar can be used to highlight dates of interest to the SharePoint Site Audience.

New Calendar dates can be by selecting the 'New' then 'New Item' from the drop-down menu in the Calendar List

development > Demo > Calendar

Calendar



To add a new calendar item you can:

- Select 'New Item' from the 'New' drop down menu.
- Enter the details required

The Title, Location, Time and Description of the meeting.

You can select whether the meeting is an all day event or a recurring meeting.

Workspace: You can select to set up a separate web space where the results of the meeting can be added.

Attach File: You can attach a file you already have available to be part of the new appointment in the same way you would attach a document to an email.

Calendar: New Item

A screenshot of the 'Calendar: New Item' form. The form has a title bar with 'Attach File' and 'Spelling...' buttons. Below the title bar, there are fields for 'Title *', 'Location', 'Start Time *' (with date and time pickers), and 'End Time *' (with date and time pickers). A large text area for 'Description' is below these. At the bottom, there are three checkboxes: 'All Day Event' (unchecked), 'Recurrence' (unchecked), and 'Workspace' (unchecked). The 'Workspace' checkbox has a description: 'Use a Meeting Workspace to organize attendees, agendas, documents, minutes, and other details for this event.' There are 'OK' and 'Cancel' buttons at the top right and bottom right of the form.

- Clicking OK will add the Appointment to the calendar.

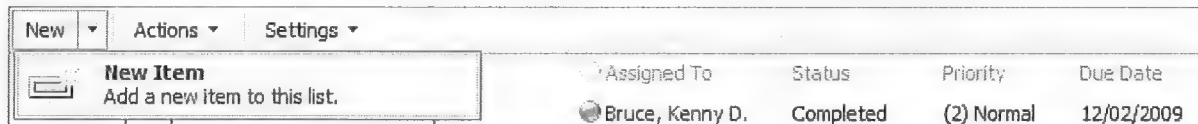
Chapter 7: Tasks

Tasks can be used to set actions and owners of actions to help the monitoring of required activities.

New tasks can be added by 'New' then 'New Item' from the drop-down menu in the Task List

development > Demo > Tasks

Tasks



Assigned To	Status	Priority	Due Date
Bruce, Kenny D.	Completed	(2) Normal	12/02/2009

Then by enetering the required details:

The Title and Description of the task.

The Priority, Status and % Complete for the task can be added and edited as required.

Assigned to: Users can select any user to assign the task to by location then using a name search or enetering the user id. You are advised that thiose the task is assigned to will be notified by email

Attach File: You can attach a file you already have available to be part of the new appointment in the same way you would attach a document to an email.

development > Demo > Tasks > New Item

Tasks: New Item

! The content of this item will be sent as an e-mail message to the person or group assigned to the item.

OK Cancel

Attach File Spelling... * indicates a required field

Title *

Priority (2) Normal ▼

Status Not Started ▼

% Complete %

Assigned To People Picker

Description

Start Date 17/03/2009

Due Date

OK Cancel

- Clicking OK will add the task to the list and notify the assigned task memebtrs by email

Editing a task:

Users with tasks assigned to them can edit the status of a task at any time by selecting 'Edit Item' from the drop down menu next to the task.

test task	Bruce, Kenny D.	Not Started	(2) Normal	
Please approve TEST	Bruce, Kenny D.	Completed	(2) Normal	26/02/2009
A change has been requested	Bruce, Kenny D.	In Progress	(2) Normal	26/02/2009

View Item

Edit Item

Manage Permissions

Delete Item

Version History

Alert Me

The task properties can then be updated.

? The content of this item will be sent as an e-mail message to the person or group assigned to the item.

OK Cancel

Attach File Delete Item ABC Spelling... * indicates a required field

Title *

test task

Priority

(2) Normal

Status

Not Started

% Complete

100%

Assigned To

Bruce, Kenny D.

Description

Start Date

25/02/2009

Due Date

Version: 1.0
Created at 25/02/2009 13:17 by Bruce, K.d.
Last modified at 25/02/2009 13:17 by Bruce, K.d.

OK Cancel

The updated task is then made available on the task list.

Tasks

New Actions Settings								
Title	Assigned To	Status	Priority	Due Date	% Complete	Link	Outcome	
Develop Proposal for SharePoint Site Template	Bruce, Kenny D.	Completed	(2) Normal	12/02/2009	100%			
Do Demo Demo	Phelps, Paul	Completed	(2) Normal	19/02/2009	100%			
Test Demo task added from outlook		Not Started	(2) Normal		50%			
test task	Bruce, Kenny D.	Completed	(2) Normal		100%			
Please approve TEST	Bruce, Kenny D.	Completed	(2) Normal	26/02/2009	100%	TEST	Change Requested of Bruce, K	
A change has been requested on TEST	Bruce, Kenny D.	In Progress	(2) Normal	26/02/2009	50%	TEST		

Chapter 8: Discussion Boards

Discussion Boards can be used to create discussion threads on any particular topic of interest to the SharePoint Site audience or members.

New Discussions can be added by 'New' then 'Discussion' from the drop-down menu in the Discussions List

The screenshot shows the 'Discussion Board' page in a SharePoint environment. The breadcrumb trail at the top reads 'development > Demo > Discussion Board'. Below this, the title 'Discussion Board' is displayed. A navigation bar contains 'New', 'Actions', and 'Settings' menus. A 'New Discussion' button is visible, with a tooltip that says 'Discussion: Create a new discussion topic.' On the right side, there is a 'Created By' field showing 'Lewis, Mark' and 'Bruce, K.d.'.

Then by entering the required details to kick off the discussion:

Subject: the matter to be discussed.

Body: The details of the discussion or an opening remark to get the discussion started.

Attach File: You can attach a file you already have available to be part of the new appointment in the same way you would attach a document to an email.

The screenshot shows the 'Discussion Board: New Item' form. The breadcrumb trail at the top reads 'development > Demo > Discussion Board > New Item'. The title 'Discussion Board: New Item' is displayed. The form includes an 'Attach File' button and a 'Spelling...' button. A legend indicates that an asterisk (*) denotes a required field. The 'Subject' field is marked as required and is currently empty. The 'Body' field is a large text area with a rich text editor toolbar. At the bottom of the form, there are 'OK' and 'Cancel' buttons.

Entering the details and selecting 'OK' will add the new discussion to the list

Viewing and replying to a discussion:

Discussions can be opened and viewed by selecting the relevant discussion from the discussion list. The thread can then be read in chronological order by default.

development > Demo > Discussion Board

Discussion Board

New ▾	Actions ▾	Settings ▾	View:	
Subject		Created By	Replies	Last Updated
Share Point collaborative environments ▾		Lewis, Mark	6	06/03/2009 10:53
New Discussion		Bruce, K.d.	0	12/02/2009 14:51

development > Demo > Discussion Board > Share Point collaborative environments

Discussion Board

Actions ▾ Settings ▾ View: Flat ▾

Posted By: [Avatar] Lewis, Mark

Started: 11/02/2009 15:20 View Properties Reply

Share Point collaborative environments
Share Point is obviously a powerful tool for collaborative groups to use, the question is how and what. So Ideas are welcome.
This tool obviously a bit like a blogg site and for discussion between anyone who has access, so maybe its for a Managment team to use rather than pushing email around alot?
Paul Please can you open this up to the following managers for their consideration.
Mike McConnell
Val Angus
Neil Hamilton
Anne Beavan
thanks Mark
Ideas welcome.

Posted: 12/02/2009 14:53 View Properties Reply

[Avatar] Bruce, K.d.
Paul didn't have an alert set up for this discussion board! He's on the case now!
Show Quoted Messages

Replies can be made to the discussion by selecting the 'Reply' icon against any post. You can then add your comments to the discussion and submit them by selecting 'OK' when finished.

development > Demo > Discussion Board > Share Point collaborative environments > New Item

Discussion Board: New Item

OK Cancel

Attach File Spelling...

Body

Addition to the post!!

From: Bruce, K.d.
Posted: 12 February 2009 14:53
Subject: Share Point collaborative environments
Paul didn't have an alert set up for this discussion board! He's on the case now!

From: Lewis, Mark
Posted: 11 February 2009 15:20
Subject: Share Point collaborative environments

OK Cancel

You post will then be added to the bottom of the thread for others to view and reply to.

Posted: 17/03/2009 13:54

View Properties

Reply



Addition to the post?

Show Quoted Messages

Bruce, Kenny D.

fact sheet

Notes for SharePoint Site Owners

Created 30 November 2011

Introduction

Now you are a SharePoint Site Owner you are responsible for:

- creating and maintaining user permissions
- creating new spaces within the SharePoint site e.g. sub-sites
- ensuring accuracy and up-to-date information on the site
- performing the role of site owner for all sub-sites created by you, or delegation of this responsibility
- dealing with queries from users regarding your site (if you are unable to answer a query regarding your site please log a call with the Service Desk, servicedesk@abdn.ac.uk, 273636)

NOTE: as the Site Owner you are responsible for the content on the site and who has permission to access to it, please be aware of this when considering the type of content you wish to store on SharePoint, if it is highly confidential, we would recommend storing this on a shared drive where the permissions are managed centrally.

Within SharePoint, a standard template called "Team Site" is available for all projects (staff requiring a variation of this should request this via the Service Desk)

A Standard Team Site Includes the following:

- Document Libraries for Storing Documents
- Task Lists
- Resources List
- Announcements
- Calendar
- Discussion Forum

This fact sheet aims to describe the most basic functions a Site Owner will need to perform in the most common features:

- [Site Users & Permissions](#)
- [Site Structure & Functionality](#)
- [Site Navigation](#)
- [Look & Feel](#)
- [Site Management Tools](#)

Site Users & Permissions

Access to a SharePoint site is managed via the process of you, the site owner, granting permissions either to individual users, to groups of users, or by the site inheriting permissions from a parent SharePoint site:

- **Inheriting permissions:** this is the default SharePoint position (e.g. CASS site has a sub-site called Research – Research would inherit permissions from the CASS parent site unless over-written by you, the site owner)
- **User Groups:** User groups can either be manually created by you, the site owner, or automatically generated from the HR database. Automated lists are called ILM (Identity Lifecycle Management) lists. Please note, ILM lists can only be based on certain attributes within the HR database. It is recommended that, wherever possible, permissions are handled by ILM groups, enabling permissions management to be automated. New ILM groups can be requested via the Service Desk.
- **Individual Users:** users can be added by selecting them from a list that links to the University's IT user list in Active Directory. This ensures that users are recognised in SharePoint and can pick up information from other Microsoft Systems (e.g. presence information from Outlook).

There are also three default permission groups already set up for each new site (Owners, Members, and Visitors), and it is recommended that where possible, these are utilised as they will simplify your site management:

- **Owners:** have **full control** over site functionality, structure, and content and should be restricted to a small number of individuals
- **Members:** can **contribute** to the site (add, amend, delete documents) but do not have any control over site functionality or structure
- **Visitors:** can access all site content but have **read only** access

Before setting up your site, you should therefore consider who (which groups and/or individuals) will be accessing your site and what level of access you would like to give them. Completing a diagram, as per below, will help you with this task:

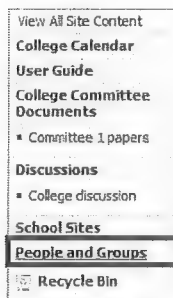
Owners (Full Control)	Members (Contribute Access)	Visitors (Read Only)
<ul style="list-style-type: none"> The overall site Owner Another person in your area who could act as your deputy/take responsibility for this site in your absence Any other member of staff you wish to give full control of the site to) DIT Staff who will support your site 	<p>Any of the following depending on scope of project/nature of the site:</p> <ul style="list-style-type: none"> All University staff managed via the automated ilm list "UOA\ilm_staff". All staff in your College managed via an ilm list All staff in your School managed via an ilm list All core staff in your School managed via an ilm list All honorary staff in your school managed via an ilm list All temp staff in your School managed via an ilm list Existing SharePoint Groups (see People and Groups) A group or groups you create to help manage access to your site Individual members of staff Stakeholders external to UoA via Guest Accounts 	<p>Any of the following depending on scope of project/nature of the site:</p> <ul style="list-style-type: none"> All University staff managed via an ilm list All staff in your College managed via an ilm list All staff in your School managed via an ilm list All core staff in your School managed via an ilm list All honorary staff in your school managed via an ilm list All temp staff in your School managed via an ilm list Existing SharePoint Groups (see People and Groups) Group or Groups you create to help manage access to your site Individual members of staff Stakeholders external to UoA via a Guest Account

Applying Permissions:

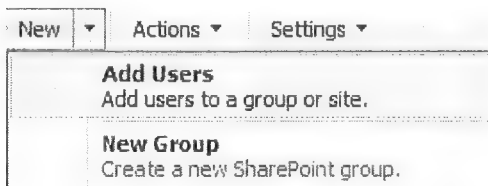
Please note that, as well as applying permissions at site level, permissions can also be managed at sub-site, folder, and document level. However, it is recommended that, wherever possible, permissions are handled at the site level to limit their complexity and minimize permission issues.

Adding Individuals or groups to **“Members”** (contribute access) or **“Visitors”** (read only) permission groups to your site (e.g from an ILM group)

1. From the Quick Launch bar, click on **People and Groups**



2. Click on the **New** button toward the top of the screen, and choose **Add Users**



Click on the **Browse** button

Users/Groups:



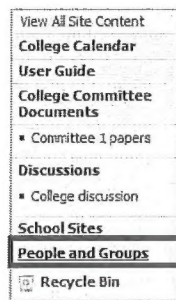
Enter name, group or ILM into the **Find** box and click on the **Search** button. Choose the individual, group or ILM group from the returned list and select **Add**

Browse

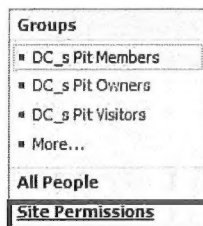
3. Under **Give Permissions** select the appropriate permission group – by default this will be set to **Members [Contribute]**
4. By default an email will be sent to the added users. If you do not wish to send an email, untick the box.
5. Click on **OK**

Setting new permissions for owners, members, or visitors

1. From the Quick Launch bar, click on **People and Groups**



2. Click on **Site Permissions** on the left



3. The next screen lists the default permission levels for each group

- Members: **contribute**
- Owners: **full control**
- Visitors: **read**

4. Click on the name of any one group to see (or edit) the permissions
5. Check and uncheck the permissions on the right, and then click on **OK**

NOTE: Make sure to leave Visitors as **Read Only**

Set individual user permissions

1. To set permissions for an individual that is different from the group he or she belongs to (e.g. **members**), start by clicking on **People and Groups** in the Quick Launch bar
2. Click on **Site Permissions** on the left
3. From the **New** button, click on **Add Users**

Click on the **Browse** and enter the last name into the **Find** box and click on the **Search** button. Choose the person from the returned list of names and select **Add** button

Under **Give Permission** select the second option: **Give users permission directly**

Choose which level of permission you wish the user(s) to have and select whether or not to send a new welcome message, click **OK**

Give Permission

☐ Add users to a SharePoint group

☐ DC_9 Fit Members [Contribute]

From permissions this group inherits on files, lists, and items...

☒ Give users permission directly

☐ Full Control - Has full control.

☐ Design - Can view, add, update, delete, approve, and customize.

☐ Manage Hierarchy - Can create sites and edit pages, list items, and documents.

☐ Approve - Can edit and approve pages, list items, and documents.

☐ Contribute - Can view, add, update, and delete.

☐ Read - Can view only.

☐ Restricted Read - Can view pages and documents, but cannot view historical versions or review user rights information.

☐ View Only - Members of this group can view pages, list items, and documents. If the document has a server-side file handler available, they can only view the document using the server-side file handler.

Site Structure & Functionality

Creating sub-sites

By default, a new sub-site uses the URL of its parent site as the first part of its URL. A sub-site can inherit the permissions and navigation of the existing site, but you can also specify unique permissions and navigation if you wish. For example, a new sub-site uses the existing top link bar and home page by default, but you can specify that it uses its own top link bar and home page.

Before creating a site, make sure that you are at the location on your site where you want to create a new sub-site.

1. Click **Site Actions**, and then click **Create**.
2. Under **Web Pages**, click **Sites and Workspaces**.
3. In the **Title and Description** section, type a title for your site. The title is a required field.

Title:

Description:

The title appears at the top of the Web page and appears in navigational elements that help users to find and open the site.

Type a description of the purpose of your site in the **Description** box. The description is optional.

4. In the **Web Site Address** section, type a URL for your site. The first part is provided for you.

URL name:

<https://sp.abdn.ac.uk/sandpit/dcpit/>

To avoid potential problems with updating or modifying the site, do not enter any of the following special characters as part of the Web address.

Special characters to avoid

/	\\	:	*	?
"	<	>		#
\t	{	}	%	

5. In the **Template Selection** section, click the tab that you want, and then select the site template that you want. (n.b. the *Team Site* option has been setup to give you a default starting position:

Select a template:

Collaboration Meetings Enterprise Application Templates
Publishing Custom

Team Site
Blank Site
Document Workspace
Wiki Site
Blog

6. In the **Permissions** section, select whether you want to provide access to the same users who have access to this parent site or to a unique set of users.

User Permissions:

- ☒ Use same permissions as parent site
☐ Use unique permissions

If you click **Use Unique Permission** you can set up permissions later after you finish entering information on the current page.

7. In the **Navigation Inheritance** section, specify whether you want the site to inherit its top link bar from the parent site or to have its own set of links on the top link bar.

